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### Quick Reference Guide:

## Beginning of Year Verification

*This guide explains the basic process for verifying 2016-17 calendars and enrolling students into schools for the 2016-17 school year.*

*(Some of this may have been done at the end of the previous year.)*

*Topics covered in this Quick Reference Guide include:*

- Verifying 2016-17 Calendars
- Summer Transfers & Graduates
- 2016-17 Enrollments
- Records Transfer
- Data Verification
- Resync State Data



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*More Information:*

[AIM New User Guide](#)

[MT Programs - Job Corps & MTDA](#)

[MT Programs – Youth ChalleNGe](#)

[Creating Households](#)

The Beginning of Year Verification establishes calendars and enrollments for the 2016-17 school year. Schools are required to enroll all students in AIM who attend at least one day of class or who receive Special Education services from the district.



Before beginning, consider the following:

#### 1. What data is entered on the Calendar?

- Calendars need a Start and End Date for the District school year, a Calendar Number, the correct grade levels for the school, and the student Start and End Dates. *page 2*

#### 2. How do I properly exit students who transferred over the summer?

- Delete the student's 2016-17 enrollment and update the 2015-16 End Status to reflect the transfer. *page 3*

#### 3. How do I record Summer Graduates?

- Summer graduates are recorded like regular graduates – change the 2015-16 enrollment End Status to 400: *Graduated*, and enter *Diploma Date*, *Diploma Type* and *Diploma Period*. *page 4*

#### 4. How do I get State IDs for new students?

- Obtain State IDs from the student's prior district or from the Student Locator. Districts may upload a Student Demographic file to locate State IDs, however, using the Student Locator reduces the potential for duplication. *pages 7-8*

#### 5. What are the correct Enrollment Start Status codes for students?

- Start Status codes should accurately reflect the prior enrollment status of the student. *page 9*

#### 6. Which Enrollment Service Type do I choose?

- Service Type indicates level of educational service the student is receiving from the district. *page 9*

#### 7. How do I send/receive a Records Transfer?

- Process requests for records transfers regularly to facilitate the transfer of Special Education records and prevent enrollment overlaps. *page 12*

#### 8. How do I verify the enrollment data I entered?

- The Student Information reports and Ad Hoc Reporting tools can be used to verify data entry. *page 13-18*

## VERIFYING 2016-17 CALENDAR(S)

Choose *Year* 2016-17 and a *School*.

From the **Index**, expand **System Administration** and **Calendar**. Click **Calendar**.

Verify (and/or enter) the district *Start* and *End Dates* (fiscal year is recommended for SPED data entry). Enter "1" in the *Number* field (if you have more than one calendar per school, each calendar must have a unique number).

Click **Save**.

Click the **Grade Levels** tab.

Verify the grade levels listed are valid for that school.

NOTE: Grade levels are determined by the OPI, not by the student's schedule or the district's building configuration. Changes to grade levels in a school must first be approved by the OPI.

Click the **Terms** tab.

Click the name of the *Term Schedule* in the **Term Schedule/Terms Editor** box (*Full Year*). (NOTE: If no term is listed in the box, see next page.)

Under *Term Detail*, enter the student *Start* and *End Date(s)* for the *Term*. Click **Save Term Schedule/Terms**.

The **Periods** and **Days** tabs are optional.

**Auto Create Term Schedules**

**Parameter Selection**

This Schedule Structure has no terms, and this tool will create some for you. Infinite Campus supports multiple term schedules, but only select the term schedules needed for your schedule. Full-year, semester, and quarter long classes can all be created in a quarter term schedule, so those options are mutually exclusive.

☒ Full Year (1 term)  
☐ Semesters (2 term)  
☐ Trimesters (3 term)  
☐ Quarters (4 term)  
☐ Other Number of Terms:

**Create Terms**

If no term is listed in the **Term Schedule/Term Editor**, click **New Term Schedule**.

Select a Term Schedule. Click **Create Terms** (the State requires only Full Year – but if you are using the MT Edition for attendance you may need to enter more information).

Follow the previous instructions to enter *Term* dates.

## SUMMER TRANSFERS

Adjust enrollments for students who transferred out during the summer.

Example: Student was enrolled in 2015-16 and was expected to return for 2016-17. A 2016-17 enrollment record was created as part of the end-of-year process. The student moved out of state over the summer, and the school received a records request at the beginning of August.

To correct the enrollment record: Select Year 2015-16 or 2016-17 and the school. Click the **Search** tab and enter the student's last name. Click **Go**.

Year: 16-17 School: Washington High School

Index Search

Student: davidson, e **Go**

Advanced Search

Search Results: 1

10 Davidson, Emily #14 [05/13/2001]

**Davidson, Emily**

Grade: 09 #14 DOB: 05/13/2001 Gender: F

Credit Summary Assessment Behavior Transportation Fees Lockers

Graduation Athletics AdHoc Letters Waiver Records Transfer Report Co

**Summary** Enrollments Schedule Attendance Flags Grades Trans

Person Summary Report Person Summary Report w/ Picture Print Mailing Label

**Person Information**

PersonID: 14

Name: Davidson, Emily Nickname:

Race Ethnicity:

State Race/Ethnicity:

Federal Designation: 6: White No Image Available

Race(s): White

Hispanic/Latino: N: No

Race/Ethnicity Determination:

Birth Date (Age: 15): 05/13/2001

Student Number: 14

State ID: 14

Person GUID: \*552222\*-4FF4-4E5A-95C6-0E5B02D0D4B

Comments:

- Modified by: Loobey, Carrie 09/21/2015 11:22

Amend the 2015-16 enrollment:

Select the name (appears below the Search Results), then the **Enrollments** tab.

Open the 2015-16 enrollment and change the **End Status** to 180: Transfer to a school out of state.

OPI recommends adding a note in 'End Comments' with the name of the district or school the student transferred to.

Click **Save**.

Delete the 2016-17 enrollment:

Open the 2016-17 enrollment and click **Delete**.

**Davidson, Emily**

Grade: 09 #14 DOB: 05/13/2001 Gender: F

Credit Summary Assessment Behavior Transportation Fees Lockers

Graduation Athletics AdHoc Letters Waiver Records Transfer Report Comments

**Summary** Enrollments Schedule Attendance Flags Grades Transcript

Save Delete Print Enrollment History New New Enrollment History

**Enrollment Editor**

Edit	Grade	Type	Calendar	Start Date	End Date
	10	P	16-17 Washington High School	08/29/2016	
	09	P	Washington High School 2016 A	09/02/2016	08/03/2016
	08	P	Adams Middle School 2015 A	09/02/2014	05/29/2015
	07	P	Adams Middle School 2014 A	08/03/2013	08/09/2014

**General Enrollment Information**

Calendar: Washington High School 2016 A

Schedule (read only): 1

\*Grade: 09

Class Rank Exclude:

\*Start Date: 09/02/2016 No Show:

End Date: 08/03/2016

End Action:

\*Service Type: P: Primary

\*Start Status:

End Status: 180: Transfer to a school out of state

Dropout Reason:

Start Comments:

End Comments:

Future Enrollment:

### For students enrolled in grades 7-12 only:

If a student did not show up for school as expected in 2016-17 and the district has not received notice or a transfer request, create a one-day enrollment record for 2016-17 in both the district's SIS and in AIM (with *Start AND End Date* the first day of school, *End Status 340: Unknown*). Later, if the district receives notice or a transfer request, change the record as described above for a transfer student.

## SUMMER GRADUATES

Adjust enrollments for student who completed graduation requirements after the end of the 2015-16 year, but **prior to** the first day of school in the 2016-17 year. They are counted as Summer Graduates.

Select *Year 2015-16* and a high school. Click the **Search** tab and enter the student's last name. Click **Go**.

Click the **Enrollments** tab. Click to open the 2015-16 enrollment record. Change the *End Status* to **400: Graduated**.

Click **Save**.

**Christman, Eva**  
Grade: 12 #170 DOB: 05/13/1998 Gender: F

Credit Summary Assessment Behavior Transportation Fees Lockers  
Graduation Athletics AdHoc Letters Waiver Records Transfer Report Comments  
Summary **Enrollments** Schedule Attendance Flags Grades Transcript

Save Delete Print Enrollment History New New Enrollment History

Edit	Grade	Type	Calendar	Start Date	End Date
	12	P	Washington High School 2016 A	09/02/2015	06/03/2016
	11	P	Washington High School 2015 A	09/02/2014	05/29/2015
	10	P	Washington High School 2014 A	09/03/2013	08/06/2014
	09	P	Washington High School 2013 A	09/04/2012	05/31/2013

**General Enrollment Information**  
Calendar: Washington High School 2016 A Schedule (read only) \*Grade: 12 Class Rank Exclude: ☐  
\*Start Date: 09/02/2015 No Show: ☐ End Date: 06/03/2016 End Action:  \*Service Type: P: Primary  
\*Start Status: 02: Continued enrollment same school, no interruption End Status: **400: Graduated**  
Dropout Reason:

Start Comments:  End Comments:

**Christman, Eva**  
Grade: 12 #996037066 DOB: 05/13/1998 Gender: F

Summary Enrollments Schedule Attendance Flags Grades Transcript  
Credit Summary Assessment Behavior Transportation Fees Lockers  
**Graduation** Athletics AdHoc Letters Waiver Records Transfer Report Comments

Save

The following fields can only be filled out once a student has entered 9th grade:  
Date First Entered the 9th Grade  
NGA Cohort End Year  
NCLB Cohort End Year

**State Graduation Record**  
Earliest Grade 9 Enrollment Information Modified Date: 04/13/2013  
Grade 9 Date: 09/04/2012 NCLB Cohort Year: 2015 District Number: 0556 District Name: Philipsburg K-12 Schools

**Enrollment Data: Infinite Campus (0556)**  
**Graduation Detail: Infinite Campus (0556)**  
**General Graduation Information**  
Diploma Date: 07/29/2016  
Diploma Type: 01: Regular Diploma  
Diploma Period: 03: Four years or with IEP allowing for longer  
Date First Entered the 9th Grade: 09/04/2012  
NGA Cohort End Year: 2016  
NCLB Cohort End Year: 2016  
Post Grad Location: IS: In-State  
Post Grad Plans: 4U: Four-year College (Public)  
State Reporting Graduation Fields  
Cohort Grad Year: 2016

Click the **Graduation** tab.

Enter the *Diploma Date*, *Diploma Type* and *Diploma Period*.

Click **Save**.

**NOTE:** The Diploma Period for a student who started grade 9 in the 2012-13 year is **03: Four years or with an IEP allowing for longer** if the student completes graduation requirements prior to the first day of school in the 2016-17 year.

## **ENTER 2016-17 ENROLLMENTS**

If 2016-17 student enrollments were not previously entered during the End of Year - 2015-16 process, enter them now.

There are two ways to enter 2016-17 student enrollments: 1) Direct Entry and 2) File Upload.

The Direct Entry method requires the district to enter enrollments directly into the AIM database. Enrollments can either be rolled from the prior year, entered individually by student using the previous year enrollment, or entered using the Student Locator.

*\*\*\* It is highly recommended that districts use the **Student Locator** to enroll all new students that do not have a State ID already identified.*

The File Upload Method requires the district to create an upload file, either by extracting data from their existing Student Information System or from an Excel template. The [templates](#) are available on the OPI AIM Webpage.

### **Direct Entry of Enrollments (Option 1 - Rollover)**

One option for direct entry of student enrollments for 2016-17 is to roll the students forward from the prior year. You may have already rolled students forward to 2016-17 during the End of Year Process for 2015-16. If not, the rollover process may still be used, even if End Dates for 2015-16 have been entered. (NOTE: If the End Dates for 2015-16 enrollments are entered before using the rollover process, check the box for "Include students whose enrollments end on the last day of the last term")

If rollover is your preferred option, see the [End of Year Collection Guide](#) for instructions.

The screenshot shows the 'Enrollment Roll Forward' web application. At the top, it states: 'This tool will promote, retain or demote enrolled students into the next calendar and grade.' Below this is a link for 'Show Detailed Instructions'. The interface is divided into several sections: 'Select Source Calendars' with a list of schools and years (e.g., 16-17 Adams Middle School, 16-17 Jefferson Elem School); 'Select Start Status' with a dropdown menu set to '01: First time receiving educational services'; '(OPTIONAL) Select Destination Calendar' with a dropdown; 'Select Destination Grade' with a dropdown; 'Select Destination Structure' with a dropdown; 'Start Date Override' with a text input field and a note: 'If school days for the next school year have been finalized and Calendar Days have been set, this date does not have to be entered.'; 'Select Source Grades' with checkboxes for grades 01 through 12, and PK, UE, UH, UM; 'Source Ad Hoc Student Filter' with a dropdown; 'Source Service Type' with checkboxes for Primary, Partial, and Special Ed Services; and 'Select Source Structure' with a dropdown. On the right side, there are checkboxes for 'Allow Duplicate Primary Enrollments', 'Totals Only', 'Show Warnings', and 'Include students whose enrollments end on the last day of the last term'. At the bottom right are two buttons: 'RUN TEST' and 'RUN'.

NOTE: If you notice a duplicate student ID, contact [OPIAIMHelp@mt.gov](mailto:OPIAIMHelp@mt.gov) to correct the situation.

## Direct Entry of Enrollments (Option 2 - Update Last Year's Enrollments)

The second option for direct entry of 2016-17 student enrollments is to use last year's enrollments to create an enrollment in the next year.

Select the 2015-16 year and a school. Click the **Search** tab, select *Student*, and **Advanced Search**.

Under **Student Search**, choose a grade level (e.g., start with 09). Click **Search**.

Select the first student by clicking the student's name. Click the **Enrollments** tab. Change the **Year** to 16-17 and select a school.

Click **New**. Enter the 16-17 *Start Date*, *Start Status*, *Grade Level* (for 16-17) and *Comments* (if applicable). Click **Save**.

(See [Start and End Status and Service Types - Notes](#) on page 9.)

Repeat for all students in this grade level. Start over with prior instructions for the next grade. If a student is moving from one school to another (e.g., from Elementary to Middle School), change the school after selecting the student.

Also:

- **Program Participation data and Aggregate Hours** may also be entered for students during this step. Enter the student's Absent Count on or after the Fall Count Date (October 3, 2016).
- **Sort By** (optional) may be entered at this time. See [Sort By Field - Notes](#) on page 9.



## Direct Entry of Enrollments (Option 3 - Student Locator)

The third option for direct entry of 2016-17 student enrollments is to use the **Student Locator**. *This is the preferred method to locate State IDs for students who are new to the district.*

To use the **Student Locator**, set the **Year** to 2016-17 and select the correct school. From the **Index**, expand **Student Information**.

Select **Student Locator**.

The screenshot shows the 'Student Locator' window. At the top, 'Year' is set to '15-16' and 'School' is 'Absarokee High School'. The left sidebar shows 'Student Information' expanded, with 'Student Locator' selected. The main area has a 'Student Search' section with instructions: 'Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in SSN, or the full legal lastName, firstName and gender. Select a student from the list or click on Create New Student. When doing a based search before they are allowed to create a new person.' Below this are input fields for Last Name, First Name, Gender, Birth Date, Middle Name, SSN #, and State ID, followed by a 'Search-->' button. A table below the search fields shows one result: Haggard, Merle, with State ID 736896801, Gender M, Birth Date 06/17/2001, and a percentage of 100.

Enter the student's **Last Name**, **First Name** and **Gender**. Click **Search**.

Use the other identifiers (**Name**, **State ID**, **Gender**, **Birth Date** or **%** which is a *wildcard search character*) to help identify a match. Hover over the record to see information about the student's last enrollment.

See [Student Locator-Notes](#) on Page 8.

This screenshot shows the 'Student Locator' search form with the following fields filled out: Last Name: Haggard, First Name: Merle, Gender: M, Birth Date: 06/17/2001, Middle Name: (empty), SSN #: (empty), and State ID: (empty). The 'Search-->' button is highlighted. Below the search fields is a table with one row: Haggard, Merle, 736896801, M, 06/17/2001, 100. At the bottom right is a 'Create New Student >' button.

If the student is located, click the student's name. If the student has never been enrolled in a Montana school, the student name will not appear, so click **Create New Student**. (See [Student Locator](#) - Notes on page 8.)

Enter the **Student Number** (Local ID) – if assigned by the district. Enter the **Identity Info** and **Enrollment Detail** (see screenshot on page 8). The fields in red are required.

The screenshot shows the 'Save' form for a new student. It has sections for 'Person Info' (Student Number: 5458, State ID: Pending, Generate Number checkbox), 'Identity Info' (Last Name: Ghandi, First Name: Mohatma, Middle Name: Lee, Suffix: (empty), Gender: Male, Birth Date: 12/27/1998, Soc Sec Number: XXX-XX-XXXX), and 'Race/Ethnicity' (Is the individual Hispanic/Latino? N: No, Is the individual from one or more of these races? (check all that apply): American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White (checked)). There is a 'No Image Available' message on the right.

### NOTE: Early Kindergarten Entries

*MCA 20-7-117 requires that students who have not reached age 5 on or before September 10 of the current school year must have special permission from the School Board to be enrolled in a regular Kindergarten program and counted for ANB. This applies anytime during the year.*

*For Kindergarten enrollment under 5, please add the Board Approval Date in the Start Comments box on the student's enrollment tab.*

The screenshot shows the 'Enrollment Detail' form. The 'Start Comments' field is highlighted with a red box and contains the text 'Board Approval at 8/15/18 Meeting'. Other fields include 'Calendar' (18-17 Jefferson Elem School), 'Schedule' (1), 'Grade' (KF), 'Start Date' (08/31/2018), 'End Date', 'End Action', 'End Status', 'Dropout Reason', and 'End Comments'.

The screenshot shows the 'Student Records Transfer' form. It includes a 'Request a Records Release' section with a note: 'This is a Records Release containing the student information, the requesting district/user and the releasing district/user.' Below this are fields for 'Student' (Last Name: Haggard, First Name: Merle, Middle Name, Gender: M, Birthdate: 06/17/2001, SSN, Grade: 10, School: 14-15 Granite High School, Start Date: 08/27/2014) and 'Enrollment Type: Primary'. The 'Requesting District & User' section includes fields for District (0556 Phillipsburg K-12 Schools), Name (System Administrator), Username (support), Request Date (08/07/2014), Work Phone, and Email. There is also a 'Comments' field and a 'Submit Request' button.

If the student was previously enrolled in another MT district and not previously enrolled in this district, a **Student Records Transfer** request will automatically appear.

When using your personal log-in, your name and phone number (if entered on the **Demographics** tab) will appear under **Requesting District & User**. Enter comments if necessary.

Click **Submit Request**.

### Student Locator - Notes

[\(Click to return to text\)](#)

A student who has an existing State ID may not show as a match in the **Student Locator** for a variety of reasons:

- Nickname versus full name (e.g., Jonathan-Johnny, Michael-Mike, Elizabeth-Liz or Beth or Libby)
- Transposed First Name/Last Name or Gender

Try a variety of options before creating a new State ID.

**NOTE:** If you know a student has an existing State ID but are unable to find the ID using the **Student Locator**, call the student's prior district or the [OPI AIM Helpdesk](#) at 1-877-424-6681.





### Sort By Field - Notes

[\(Click to return to text\)](#)

The **Sort By** field appears at the bottom of the Enrollment tab screen for a student's enrollment record. Entering data into the **Sort By** field is optional.

The **Sort By** field is an additional identifier used for sorting test booklet labels (either ELP or CRT). Districts may enter any label in the **Sort By** field, such as teacher name, team name, room number, or any other sort option desired. Test labels for CRT or ELP will be sorted first by *District*, then *School*, then *Grade*, then *Sort By* field (if entered).

If you intend to use the Sort by label, it is recommended to enter the field during the enrollment process.

### Start Status and Service Types - Notes

[\(Click to return to text\)](#)

**Start Status** codes should accurately reflect the last active enrollment of a student. A complete list of codes is defined in [Appendix A](#). A few common examples include:

- Student was previously enrolled in a home school - **Start Status** is *09: Transfer from a home school in state*.
- Student was previously enrolled in a private school in another state - **Start Status** is *06: Transfer from an out of state school*.
- Use **Start Status 01: First time receiving educational services** only if the student was never enrolled in any type of school. Kindergarten students are always *01: First time receiving educational services*, unless they were enrolled in a public school's PK program for Special Education services or they are repeating Kindergarten.

**Service Types** should accurately reflect the type of service the student is receiving from the school.

*P: Primary* - Student is enrolled in the school to receive education services

*N: Special Ed Only* - Student receives Special Education Services (PK students or students concurrently enrolled at a private or home school)

*S: Partial (Secondary)* - Student is primary enrolled in another school but participates in an accredited educational program at a this school

## File Upload of Enrollments (Option 1 - Extract File)

The first option for using the File Upload method is to create an extract file from the district's Student Information System in the \*.tsv or \*.txt format.

Perform the **Student Demographic** file upload first, followed by the **Enrollment** file upload.

From the **Index**, expand **MT State Reporting**. Select **MT Data Upload**. From **Import Type**, select **Student Demographics**. Under **Work to Perform**, select **Validate and Test File**. Browse for the \*.tsv or \*.txt file.

Click **Upload**.

### THIS STEP IS CRITICALLY IMPORTANT!

Check the **Import Results Summary** for **Errors** and **Warnings**.

**Results:**  
 File Name: test.txt  
 Processing Started Time: Mon Aug 25 13:07:04 CDT 2014.  
 Processing Finished Time: Mon Aug 25 13:07:04 CDT 2014.  
 Total Time To Process File: 0.577 seconds.

0 Records Inserted.  
 0 Records Changed.  
 0 Records Deleted.  
 0 Records No Changes.

**Error Count:0**  
**Warning Count:2**

**Error Detail:**  
 Line Number Error Message Content  
 No Errors

**Warning Detail:**  
 Line Number Warning Message  
 2 No matching student found. A new state ID will be generated upon 'Load Partial File'.  
 3 No matching student found. A new state ID will be generated upon 'Load Partial File'.

- **Errors** MUST be corrected before uploading.
- **Warnings** are messages about potential issues with uploading students – please check these thoroughly and do not load the file until all issues are addressed.
  - If **Warnings** state “No matching student found”, see special instructions on next page before proceeding.
- When all **Errors** have been cleared and **Warnings** checked, change the **Work to Perform** to **Load Partial File**. The **Import Type** should be **Student Demographics**.
- Browse for the file and click **Upload**.

Repeat the process for the Student Enrollment file, choosing **Index**, **MT Data Upload**, and from **Import Type** select **Student Enrollment**.

## Warning - No matching student found

If the Warning Detail lists “No matching student found”, AIM will create a new state ID for the student when the Student Demographics file is uploaded.

- Do not upload the Student Demographics file if you think there is already a state ID for this student, to avoid duplication. Instead, check the student locator to identify the ID, or call the AIM Helpdesk at 1-877-424-6681 for assistance.
- (This must be done BEFORE uploading the Student Enrollment file)* If a state ID is needed, upload the Student Demographics file and save the report of new state IDs that AIM generates (instructions below). Use the file of new IDs to upload into the district local SIS, or enter the IDs manually in the local SIS.

To capture the file of new state IDs: When, after uploading the Student Demographics file (page 10), AIM displays the upload status report. The report contains a link to download the file with new IDs. **Click** *Click Here*.

The report shows the new state IDs. Save the file for future reference, and enter the information in the local SIS. After updating the local SIS, proceed to upload the AIM Enrollment extract (see page 10).

<b>Results:</b>		
File Name: test.txt		
Processing Started Time: Mon Aug 25 13:07:04 CDT 2014.		
Processing Finished Time: Mon Aug 25 13:07:04 CDT 2014.		
Total Time To Process File: 0.577 seconds.		
0 Records Inserted.		
0 Records Changed.		
0 Records Deleted.		
0 Records No Changes.		
<b>Error Count:</b> 0		
<b>Warning Count:</b> 2		
<b>Error Detail:</b>		
Line Number	Error Message	Content
No Errors		
<b>Warning Detail:</b>		
Line Number	Warning Message	Content
2	No matching student found. A new state ID will be generated upon 'Load Partial File'.	SD(0556)null(9991057)Mor
3	No matching student found. A new state ID will be generated upon 'Load Partial File'.	SD(0556)null(9990065)Pax

<b>Results:</b>		
File Name: test.txt		
Processing Started Time: Mon Aug 25 13:09:48 CDT 2014.		
Processing Finished Time: Mon Aug 25 13:09:50 CDT 2014.		
Total Time To Process File: 1.357 seconds.		
2 Records Inserted.		
0 Records Changed.		
0 Records Deleted.		
0 Records No Changes.		
The import has generated 2 new state IDs. These state IDs will now be included on the appropriate extracts.		
<a href="#">Click here</a> to download the Student Demographics file with these new ids.		
<b>Error Count:</b> 0		
<b>Warning Count:</b> 2		
<b>Error Detail:</b>		
Line Number	Error Message	Content
No Errors		
<b>Warning Detail:</b>		
Line Number	Warning Message	Content
2	No matching student found. A new state ID will be generated upon 'Load Partial File'.	SD(0556)null(9991057)M
3	No matching student found. A new state ID will be generated upon 'Load Partial File'.	SD(0556)null(9990065)P

newStateIDs - Notepad									
File	Edit	Format	View	Help					
HD	08/25/2014	13:23:11	MT9.1						
SD	0556	367671360	9991057	Moreo	Charles Dean	M	06/07/1996	N	N
SD	0556	888205549	9990065	Paxini	John Wayne	M	10/25/1996	N	N

## File Upload of Enrollments (Option 2 - Excel file)

Another option is to use templates to create an Excel file of enrollment data and convert it to the format needed to upload into AIM. The **Student Enrollment Template** and **Student Demographic Template** are available on the OPI AIM Webpage ([templates](#)). From the AIM Webpage, save the **Student Demographic Template** and **Student Enrollment Template**.

Open the **Student Demographic Template**. Enter the required information (shown in red) for each student.

Delete the first three rows of the file and save as a \*.tsv or \*.txt file. Open the \*.tsv or \*.txt file and insert a header row (HD *tab* date *tab* time *tab* MT9.1). Save the file.

Follow the instructions to upload the file (see Option 1 above).

No	08/01/2011	15:48:21	MT9.1
SD	0280	119459608	50 Paisley Brad
SD	0280	125662052	68 Yearwood Trisha
SD	0280	149165791	45 Millsap Ronnie
SD	0280	166135951	64 Williams Hank
SD	0280	180735107	41 Lynn Loretta
SD	0280	188415691	55 Seals Dan
SD	0280	193009537	12 Brooks Garth
SD	0280	195299033	28 Gill Vince
SD	0280	196400321	54 Rich Charlie
SD	0280	210904318	17 Carter June
SD	0280	212117740	67 Judd Wynonna
SD	0280	214063709	31 Harris Emmylou
SD	0280	218199532	52 Pickler Kellie
SD	0280	223236465	37 Krauss Allison
SD	0280	240183925	70 Brown Zac
SD	0280	250939665	46 Montgomery John Michael
SD	0280	281099467	43 McCoy Neal
SD	0280	282085655	15 Carey Mariah
SD	0280	287077795	22 Coe David Allen

Repeat for the **Student Enrollment Template**.

## RECORDS TRANSFER

Records transfers are only required for students who have Special Education records in the prior school district. However, it is recommended that districts use the Records Transfer for all students who transfer into the district in order to view student enrollment histories and LEP data.

**Huxtable, Theodore**  
Grade: 10 DOB: 12/01/1998 Gender: M

Summary Enrollments Schedule Attendance Flags Grades Transcript

Credit Summary Assessment Behavior Graduation AdHoc Letters **Records Transfer**

New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District
08/07/2014	Huxtable, Theodore	request	Cascade Public Schools	

Refer to these guides on the OPI AIM Webpage at [AIM Reference Guides](#)

[Records Transfer](#)

[Records Transfer for AIM Administrators](#)

## DATA VERIFICATION

The first step in the data verification process is to make sure the data is correct at the district level! This may involve a dialogue with specific program staff, including the Title I Director, SPED Director, lunch staff, etc.

If the data in the district's local Student Information System (SIS) is incorrect, the data in the AIM MT Edition will likely be incorrect as well.

Once the enrollment data is transferred to AIM (either by direct entry or file upload), there are numerous tools in Infinite Campus to verify data, including the **Student Information Reports** (see instructions on following pages) and the **Ad Hoc Reporting** tool.

The following sections explain how to use these reports to verify data accuracy and completeness.



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Makayla Pederson

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NOTE: If you discover a duplicate student ID, please contact [OPI AIM Help](#) to correct the situation.

## Student Information Reports

From the **Index**, expand **Student Information/Reports**.

Many of these reports are useful for verifying enrollment data. For example:

The **Enrollment Status** report lists students by name, according to set criteria. You can choose parameters for the report.

**Student Enrollment Status**

This report lists students' enrollment start/end status and mailing address. The default calendar year is the current selected calendar.

Which students would you like to include in the report?

☒ Grade ☐ Ad Hoc Filter

Grade:

Enrollment Add Date: From  To

Enrollment Drop Date: From  To

Display Options: ☒ Start Date ☒ End Date

How would you like the report sorted?

☒ Alpha ☐ Grade ☐ Student Number

Which calendar(s) would you like to include in the report?

☒ active year ☐ list by school ☐ list by year

15-16  
15-16 Granite High School  
15-16 Phillipsburg 7-8  
15-16 Phillipsburg School

Which enrollment status would you like to include in the report?

Start Status:    
02 Continued enrollment same school, no interruption  
03 Re-entry to the same school after withdrawal  
04 Transfer from public school in district or state  
05 Transfer from public school under NCLB son choice  
06 Transfer from an out of state school  
07 Transfer from a school from out of the country  
08 Transfer from a private school within the state  
09 Transfer from home school within the state

End Status:    
105 Change in grade level during regular school year  
110 Promoted to another school in the same district  
120 Transfer to a public school in the same district  
130 Transfer to public school under NCLB son choice  
140 Transfer to public school in another district in MT  
150 Transfer to a MT state-funded school  
160 Transfer to a private school in the state  
170 Transfer to a home school in the state

☐ Print in HTML format

Generate Report

The **Enrollment Summary** report gives a count of students by *School, Grade, Race/Ethnicity* and *Gender* as of a specific date.

**Enrollment Summary Report**

This report will list a breakdown of enrollments grouped by school, grade, gender and race/ethnicity. The report can be generated using Federal Race/Ethnicity designations or State Race/Ethnicity values. If your state has many different values for Race/Ethnicity, the Tail report format is recommended. Students with enrollments flagged as "No Show" are not included in this report.

Enrollment Effective Date:

Which schools would you like to include in the report?

☒ All Districts  
Adams Middle School  
Jefferson State School  
Washington High School

Which Race/Ethnicity values would you like to use?

☒ Federal Race/Ethnicity Values  
☐ State Race/Ethnicity Values

How would you like to format the report?

☒ Original Format: Race/Ethnicities across the top and Grade Levels vertically  
☐ Tail Format: Grade Levels across the top and Race/Ethnicities vertically

What types of enrollments would you like to include in the report?

☒ P-Primary  
☒ S-Partial  
☒ N-Special Ed Services

Report Options:

☐ Observe State Exclude (Do not include enrollments marked as state exclude)  
☐ Only print Race/Ethnicities in which there is at least one student with that value  
☐ Print in HTML format

Generate Report

The **Enrollment Summary Details** report is a detailed version of the Summary report and offers many more filtering options to choose from.

**Enrollment Summary Details Report**

This report is a detail version of the Enrollment Summary Report. Student demographic and enrollment information will display and sort as determined in the report editor. Either Federal or State Race/Ethnicity values can be used. This report can be run for multiple calendars within a School Year. It is preferable to select grade levels or an Ad Hoc Filter. Using both will narrow the reporting population by the criteria used in both filters.

Enrollment Effective Date:

Grade(s):

Ad Hoc Filter:

Which calendar(s) would you like to include in the report?

☒ All Districts  
15-17 Adams Middle School  
15-17 Jefferson State School  
15-17 Washington High School

What types of enrollments would you like to include in the report? At least one must be selected.

☒ P-Primary  
☒ S-Partial  
☒ N-Special Ed Services

☐ Observe State Exclude (Do not include enrollments marked as state exclude)

Which Race/Ethnicity values would you like to use?

☒ Federal Race/Ethnicity Values  
☐ State Race/Ethnicity Values

Which enrollment status would you like to include in the report?

Start Status:    
02 Continued enrollment same school, no interruption  
03 Re-entry to the same school after withdrawal  
04 Transfer from public school in district or state  
05 Transfer from public school under NCLB son choice  
06 Transfer from an out of state school  
07 Transfer from a school from out of the country  
08 Transfer from a private school within the state  
09 Transfer from home school within the state

End Status:    
105 Change in grade level during regular school year  
110 Promoted to another school in the same district  
120 Transfer to a public school in the same district  
130 Transfer to public school under NCLB son choice  
140 Transfer to public school in another district in MT  
150 Transfer to a MT state-funded school  
160 Transfer to a private school in the state  
170 Transfer to a home school in the state

☐ Print in HTML format

Generate Report





## Ad Hoc Reporting

The **Ad Hoc Reporting** tool can also be used for data verification. The tool can be used in two ways: 1) Select filters to generate query reports (see our guide, [Ad Hoc Reporting](#); and 2) Select from State Published (i.e., “canned”) reports for checking various requirements to avoid common errors.

### Run the State Published reports

Choose a *Year* and *School*. From the **Search** tab, click **Advanced Search**.

Under **Saved Filter** expand the State Published list. *Select* a report and Click **Search**.

### Naming Key for State Published Ad Hoc Reports

State Published ad hoc reports are named according to the time of year and/or the collection for which they are intended:

ADA = Average Daily Attendance Collections (ADA).

ALL = Can be used any time of year.

BOY = Beginning of Year Collections

CTE = Career and Technical Education Data Collections

EOY = End of Year Collections

FALL = Fall Count Date Collections

LEP = Limited English Proficient

SPRING = Spring Count Date Collections

TW = Testing Window Count Date Collections

### All Users should run these State Published Ad Hoc Reports:

**ALL Kindergartners with N Service Type** - (Be sure to select *Year 16-17*) This report shows kindergartners who have a 2016-17 enrollment with a service type of N, which signifies the student receives special education services only (i.e., no educational services). Most kindergartners (including those with special ed services and those without special ed services) should instead have service type P (primary educational services). This error usually occurs when PK students with N service type are rolled into the new year for enrollment, carrying the N service type along. Review the report and amend the kindergarten student enrollment records as needed to change the N service type to P.

**ALL Preschoolers Not with an N Service Type** - (Be sure to select *Year 16-17*) This report shows preschool students who have a service type other than N. All preschoolers attending a special education preschool program should have N service type, which signifies they receive special education services only (i.e., no educational services). Review the report and amend the preschool student enrollment records as needed to enter the N service type.

**Campus Search**

Search for a record being tracked in Campus by using search fields or by selecting a Saved Filter. If you have created a Saved Filter and do not see it in the list, it is likely the Saved Filter was created for a context other than the current (Example: A student filter cannot be applied to a Census Person Search). You may search school-wide.

**Student Search**

StateID

Last Name

First Name

Student Number

SSN

Grade

Birth Date

Gender

Person ID

Locker Number

**Special Ed**

Status

Setting

Disability

**Saved Filter**

- Special Ed Data
- State Published
- Active Students
- ADA 2014-15 Days Present > Days Enrolled or >1
- ADA 2014-15 Missing Days Present or Days Enroll
- ALL Gifted and Talented 2014-15
- ALL Homeless at MV district not McKinney-Vento
- ALL Homeless Students
- ALL Homeless that are Unaccompanied
- ALL Kindergartners with N Service Type
- ALL Military Connected Missing Military Status
- ALL Military Connected Students
- ALL NAEP 4th Grade as of 1/5/15
- ALL NAEP 8th Grade as of 1/5/15
- ALL NOT Homeless but has Night Time Residence
- ALL Preschoolers Not with N Service Type
- ALL Spec Ed Status - Unlocked IEP Currently
- ALL Special Education Medicaid Report
- ALL Students with N Service Type - Not PK

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MT State Reporting
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### State Data Resynchronization

This tool will selectively resynchronize data from the district edition to the state edition. The resynchronization will happen asynchronously and you will receive a notification when it completes. The primary uses for this tool include: forcing an initial sync of data to the state after a district goes live, forcing a sync of information modified outside of the application (i.e., through a SQL query) to the state, and forcing a sync of information at reporting time to ensure that the state has the most accurate and timely information available.

Resync Data For The Current School Year (2016-2017)

☒ Check dependencies

<input type="checkbox"/>	Dist Objects	Last Resync	Results	Status Legend
<input checked="" type="checkbox"/>	[-] District	06/17/2016 00:06:03	Processed: 1 Errors: 0	
<input checked="" type="checkbox"/>	[-] School	06/17/2016 00:06:04	Processed: 3 Errors: 0	
<input checked="" type="checkbox"/>	[-] Calendar	06/17/2016 00:06:04	Processed: 3 Errors: 0	
<input type="checkbox"/>	CourseSection	06/26/2016 12:32:30	Processed: 0 Errors: 0	
<input checked="" type="checkbox"/>	[-] ScheduleStructure	06/17/2016 00:06:04	Processed: 3 Errors: 0	
<input type="checkbox"/>	TermSchedule	06/26/2016 12:32:30	Processed: 3 Errors: 0	
<input type="checkbox"/>	[-] PeriodSchedule	06/26/2016 12:32:30	Processed: 3 Errors: 0	
<input type="checkbox"/>	Day	06/26/2016 12:32:30	Processed: 0 Errors: 0	
<input checked="" type="checkbox"/>	[-] StructureGradeLevel	06/17/2016 00:06:04	Processed: 3 Errors: 0	
<input checked="" type="checkbox"/>	[-] PersonIdentity	06/17/2016 00:06:04	Processed: 268 Errors: 0	
<input type="checkbox"/>	BehaviorType	06/26/2016 12:32:30	Processed: 0 Errors: 0	
<input type="checkbox"/>	BehaviorResolutionType	06/26/2016 12:32:30	Processed: 0 Errors: 0	
<input type="checkbox"/>	BehaviorResponseType	06/26/2016 12:32:30	Processed: 0 Errors: 0	
<input type="checkbox"/>	Behavior	06/26/2016 12:32:30	Processed: 0 Errors: 0	
<input type="checkbox"/>	CensusContactSummary	06/26/2016 12:32:30	Processed: 169 Errors: 0	
<input type="checkbox"/>	ContactLog	06/26/2016 12:32:31	Processed: 0 Errors: 23	
<input type="checkbox"/>	Employment	06/26/2016 12:32:31	Processed: 19 Errors: 0	
<input type="checkbox"/>	EmploymentAssignment	06/26/2016 12:32:31	Processed: 80 Errors: 0	
<input type="checkbox"/>	EmploymentBackground	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	EmploymentCredential	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input checked="" type="checkbox"/>	[-] Enrollment	06/17/2016 00:06:04	Processed: 264 Errors: 0	
<input type="checkbox"/>	Graduation	06/26/2016 12:32:31	Processed: 89 Errors: 0	
<input type="checkbox"/>	[-] Roster	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	RosterVerificationRequest	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	RosterVerificationSection	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	RosterVerificationSectionStaff	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	RosterVerificationSectionStudent	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	Evaluation	06/26/2016 12:32:31	Processed: 25 Errors: 21	
<input type="checkbox"/>	[-] Team/Member	06/26/2016 12:32:31	Processed: 206 Errors: 0	
<input type="checkbox"/>	[-] Plan	06/16/2016 23:01:02	Processed: 451 Errors: 2	
<input type="checkbox"/>	PlanProgressReport	06/26/2016 12:32:31	Processed: 262 Errors: 6	
<input type="checkbox"/>	Form	06/26/2016 12:32:31	Processed: 281 Errors: 0	
<input type="checkbox"/>	HealthScreening	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	ImmCertificate	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	LEP	06/26/2016 12:32:31	Processed: 3 Errors: 0	
<input type="checkbox"/>	LepService	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	LepAccommodation	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	MedicalInsurance	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	POBEligibility	06/26/2016 12:32:31	Processed: 66 Errors: 0	
<input type="checkbox"/>	ProgramParticipation	06/26/2016 12:32:31	Processed: 340 Errors: 0	
<input type="checkbox"/>	PublishedTabCustomStudent	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	[-] Test	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	TestScore	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	TranscriptCourseSE	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	VaccineShot	06/26/2016 12:32:31	Processed: 0 Errors: 0	
<input type="checkbox"/>	PersonIdentityNoStateOnly	06/26/2016 12:32:30	Processed: 0 Errors: 0	

Send Resync

## RESYNC DATA

A data sync is required for all file uploads. It is recommended to sync data before collection due dates.

This process syncs the data from Montana Edition and District Edition schools to the State for use in state reporting.

From the **Index**, expand **System Administration/Data Utilities/Resync State Data**. If syncing data from the 2016-17 year, set the *Year* to 2016-17. If syncing data from the 2015-16 year, set the *Year* to 2015-16.

To sync **Enrollments** check the box for *Enrollment*. All connected data elements will automatically populate.

At the bottom,

click **Send Resync**.

The green radio buttons indicate a successful resync of data, and a message will appear in the **Process Inbox**.

Year 16-17 School Absarokee High School

**Enrollment Verification Report**

This report will communicate with the state edition server to compare local enrollments with the data that exists at the state, it will then generate a report that summarizes any differences.

Select Which Enrollments To Include

Selected School Year 2017

Schools All Schools  
 Absarokee 7-8  
 Absarokee High School  
 Absarokee School

State Grade All Students  
 KF  
 KH  
 P1  
 PK  
 01

Exclude Enrollments Matching Any Of These Additional Criteria

Calendar Excluded ☒

No Show ☐

State Excluded ☒

State Exclude Grade Levels ☒

State Unmapped Grade Levels ☒

Select The Enrollment Fields To Compare Between District And State Edition

☒ State Grade Level ☒ Service Type

☒ Start Date ☒ End Date

☒ Start Status ☒ End Status

☒ Schedule ☒ No Show (if included)

☒ Next Calendar ☒ Next Schedule

☒ Next State Grade Level ☒ End Action

Report Display Options

Show Summary Totals ☒

Show Enrollments Missing At State ☒

Identify students missing at state due to overlap prevention ☒

Show Enrollments Missing At District ☒

Show Enrollments With A Field Difference ☒

Show Value At District And State Of Each Difference ☒

Generate Report

## Enrollment Verification Report

After syncing enrollment data to the State, run the Enrollment Verification Report to check for differences between data entered in the MT Edition application and data that has synced to the State.

From the **Index**, expand **Student Information/Reports**. Select **State Enrollment Verification**.

There are a number of options and fields to choose from. Choose the items you want to see in order to verify, and

Click **Generate Report**.

This report will show you differences between the District and the State. Attempt to fix any errors and perform another State Resync.

If differences do not resolve or you need further assistance, contact the OPI AIM Helpdesk as noted below.

**For further assistance, contact the OPI AIM Helpdesk at 1-877-424-6681  
or [opiainhelp@mt.gov](mailto:opiainhelp@mt.gov)**

